

Mail Merge Part 2: Running the Merge

60 minutes

ICT Specialism 1: Word processing

Outcome M1.U1.2

Outcome M1.U3.3

WHAT THIS LESSON DOES

This lesson teaches you how to run a mail merge using a sample recipient list and letter template, then finish your own Something Real batch. Preview each personalised letter, finish to a new document, export PDF, and spot-check pages so they are error-free.

CURRICULUM OUTCOMES

Outcome	What the specification asks for
M1.U1.2	Understand and explain key concepts relating to devices, storage and software.
M1.U3.3	Search effectively for information on the internet by using key words, quotation marks for exact phrases and advanced search options.

WHAT STUDENTS SHOULD BE ABLE TO DO

- Run a mail merge and preview individual merged documents
- Finish the merge to a new document and export a PDF batch
- Spot-check layout problems across merged pages

BEFORE THE BELL

- Hard pre-flight: Place sm1_doc4_mailmerge_source_sample (three contacts) and sm1_doc4_mailmerge_letter_sample in shared sm1/ for catch-up and the guided task; mirror if students use a second shared path.
- Room path decision: all-desktop-Word, all-Google-manual, or named students on a desktop machine, announce at the start of the guided task.
- Confirm classic Word via Open in Desktop App where Mailings is needed; Word Online alone is often not enough.
- No Google add-on is required, the written Docs path is manual fill-from-sheet. Optional: pre-copy sm1_doc4_mailmerge_batch_working for support.
- Board note: guided PDF = sm1_doc4_mailmerge_output_practice.pdf; keeper PDF = sm1_doc4_mailmerge_output.pdf.
- HARD PRE-FLIGHT: load sample source+letter into shared sm1/ (and mirror if students use a second shared path). Decide room path before class: all-desktop-Word, all-Google-manual, or named students on a desktop machine. Confirm Open in Desktop App / classic Word where Mailings is needed. Check PDF save/rename on classroom devices. Optional: pre-copy sm1_doc4_mailmerge_batch_working for support. No Google add-on required.
- Prepare one clean preview screenshot and one broken preview screenshot for a quick board comparison. If using Google, rehearse the 60-second three-page fill demo.
- Room path decided and announced. Sample source and letter open on the demo machine; desktop Word available where needed; optional pre-copied batch_working for support; PDF rename path tested on both suites.
- Be ready to demo one blank-field fix, one Open in Desktop App hop, and one Docs page-break refill during a short hands-up call-out.
- 30-second filename/finish recap on board, then circulate with a quick filename and spot-check pass. Note any student still on the sample only and move them onto own or adapted rows.
- No prep needed beyond a quick pair-share prompt; ready to shrink to one question if exports overrun.
- Quick end-of-lesson portfolio check on the keeper filename if time allows.

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HOW THE LESSON RUNS

5 min	introduction	Introduction
6 min	content	Key concepts
18 min	activity	Step-by-step task
3 min	content	Common issues
20 min	activity	Independent practice
3 min	content	Reflection
5 min	summary	Lesson summary

TEACHING MOVES

- Demo Preview/Finish on desktop Word, or a full three-page Docs fill, first, then release students to the sample.
- Keep print and email as a 30-second "later when sending for real" mention only.
- Google support: pairs, pre-copied working file, or two-contact guided minimum still saving the practice PDF name.
- Before IP: 30-second recap of own filenames, finish option, keeper PDF only.
- Time slip priority: practice PDF banked → own merge started → keeper PDF hard target.
- Circulate for filename discipline and source-side fixes.
- Use whole-class discussion for reflection; no written reflection file.

WHAT TO WATCH FOR

- Finishing before checking records.
- Saving the guided run as the keeper name (or both runs as the same PDF) and overwriting evidence.
- Editing one finished letter instead of the source sheet.
- Leaving Downloads/document.pdf outside sm1/03_finished/.
- Looking for File → Download in classic Word after Open in Desktop App (use Save As or Export).

DIFFERENTIATION

- Support: sample pair + printed three-record checklist; pair-catch-up for missing Part 1; pre-copied Docs working file; two-contact guided minimum.
- Extension: optional extra merge field only after keeper PDF is banked.
- Support: desktop Word machine or teacher-led finish for students blocked on browser Mailings.